

InfoSource...



...the new way to look at policy

Training Packet

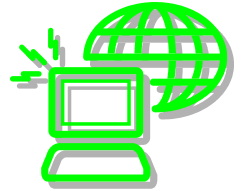
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January 2004

InfoSource Training Guide

InfoSource (previously known as RoboHelp) will house policy for all DWS, Medicaid, and CHIP programs. It will also enable staff to access procedure and training information directly from policy. It will be available on the Intranet.



Is InfoSource A New Manual?

Yes! The newly combined Financial, Food Stamp, and Child Care manual is now called the Financial, Food Stamp, and Child Care Eligibility manual. The current Financial, Food Stamp, and Child Care manuals will not be maintained.

The Medicaid and CHIP manuals will also be new. Even though Medicaid policy for ABD, Nursing Home and Family Medicaid/PCN will be combined into one manual most of the policy has not been combined. Only sections 100, 200, 700 and 800 have been combined and are common between the three Medicaid manuals.

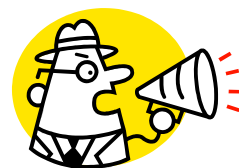
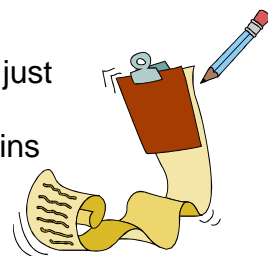


What are the benefits of InfoSource and the new organization of the policy?

1. Easy comparison of how each program applies policy to a situation, income, asset, etc.
2. Policy has been thoroughly reviewed with all of the program specialists and “gaps” in policy have been addressed for all programs.
3. Where allowed by federal policy, there has been an attempt to simplify policy and align policy to be consistent for all programs.
4. InfoSource uses Internet functionality. Users who have previous experience with the Internet will be able to apply that knowledge to using InfoSource.
5. Policy will link to procedures, forms, and training.
6. Outdated policy will still be available.
7. All policy regarding a topic will be located in a specific area of policy. If there are related topics in another section of policy, there will be a link to that section of policy.
8. Functionality of InfoSource will be similar to Folio. There will be a Contents, Index, and Search button to navigate through InfoSource.
9. Users will be able to bookmark specific policy text using Internet browser capabilities.
10. InfoSource will be updated timely to reflect policy updates. Staff using InfoSource can be guaranteed that they are using the most current policy.
11. In the future, eREP rules will be linked to policy.

What has InfoSource changed?

1. Policy has been reorganized. The Financial, Food Stamps, and Child Care manuals have been combined into one manual.
2. Policy will explain an element of policy. If the policy is the same for all programs, policy will indicate it is for all programs.
 - If a program has different rules or special stipulations, it will also show the specific policy for that program.
3. Policy only contains policy rules.
 - Most examples and procedures are available through links within the Financial, Food Stamp, and Child Care Eligibility Manual. The user will just need to click on the link to access the information.
 - The Medicaid Manual still contains policy and procedures. It also contains links to training.
 - Procedural information from policy is linked to the Procedures manual as appropriate.
 - Procedures and instructions on how to execute actions on PACMIS will be removed when we no longer have PACMIS.
4. There are different access views of accessing InfoSource information.
 - DWS staff have access to all levels which include policy, training links, glossary links, forms links, procedure links, and pop-up definitions.
 - The public access will be limited; they have access to policy but not to the training, forms, or procedures links. Their version will include pop-up definitions.
5. All programs use the same terminology.
6. A “What’s New” page is a new feature for InfoSource. This will be used to introduce policy updates. Along with the “What’s New” page, policy changes will be announced in the monthly SDS updates. The SDS updates will include the draft policy that is being changed. The “What’s New” page will be bulleted list of policy changes. It will be updated as needed.
7. Navigation through InfoSource follows browser (Internet) functionality. For example, the Table of Contents and Index use a closed/open book icon to indicate if there are additional sections of policy under that heading.
8. Policy is formatted into sections. Users will use the Table of Contents on the Navigation pane to identify a section of policy to read. That policy section will pop up in the Content pane.



- Users will need to use the Table of Contents to access the next policy section. This will help the user keep track of where he is in policy. (In Folio, the user could start at Section 100 and use the scroll bar to view the entire manual.)
- There will also be Forward and Back arrows to help scroll through sections of policy.

9. “Hard” copies of policy will no longer be printed and distributed by SDS.



Organization of the Financial, Food Stamps, and Child Care Eligibility Manual

Section 100 – General Information and Provisions

- General information about program and the government agencies from which they are funded.
- Customer rights and responsibilities
- Safeguarding and release of customer information
- Safeguarding and accessing Income Match Data
- Customer complaints
- Agency conferences
- Fair hearings

Section 200 – Program Requirements

- Overview of programs, who they serve, and general requirements
- Citizenship and alien status requirements
- Utah residency requirements
- Social Security Number requirements
- Household composition
- Additional household situations – ineligible, disqualified, and non household members; residents of institutions; strikers; students; communal dining facilities, etc.
- Program time limits

Section 300 – Program Participation Requirements

- Duty of Support
- Third Party Liability
- Participation requirements for financial programs – FEP, FEP-TP, AA, RCA, GA, WTE
- Participation requirements for Child Care – FEP, ESCC
- Participation requirements for Food Stamps
 - ABAWD
 - Work requirements
 - Employment and Training
 - Voluntary quit
 - Voluntary reduction of work hours

Section 400 – Income Standards

- Whose income to count
- Income types – unearned, earned, exempt, other
- Income disregards
- Determination of a best estimate

Section 500 – Asset Standards

- Definition of assets, asset limits, value of assets, availability of assets, etc...
- Divorce decrees – how they assist in determining ownership
- Exempt assets
- Transfer of assets, conversion of assets
- Assets of ineligible, disqualified, and non household members; assets of the sponsors of an eligible alien
- Trusts, sales contracts
- Vehicles

Section 600 – Eligibility, Issuance Amount, and Payment Determination

- Prospective eligibility and budgeting
- Eligibility tests and issuance determination for all programs
- Supportive Service Issuance – Z funds, Y funds, etc
- Forms of payment – Utah Horizon EBT system, 2 party checks

Section 700 – Eligibility Processes and Case Maintenance

- Application
- Interview
- Processing the application
- Verifications
- Case record
- Eligibility period
- Reviews
- Re-establishing need for child care
- Reopening cases without a new application
- Changes
- Failure to report
- Case closure
- Notification

Section 800 – Corrective Payments

- Payment errors
- Overpayment referral for calculation
- Overpayment Calculation
- Adjudication
- Collections
- Non-cooperation with repayment of overpayments
- Intentional program violation and fraud

Employment Counseling Section

- This section is a compilation of all of the policy in the current Financial, Food Stamps, and Child Care Manuals on the Employment Counseling process.
- It is a temporary section that will be deleted when the new consolidated Employment and Business Services Manual is developed.
- The section numbers are the same as they currently are in the Financial, Food Stamp, and Child Care Manuals.

Organization of the Medicaid Eligibility Manual

Each section of policy will contain the following information.

Section 100 - General Provisions

Section 200 - Basic Rules

Section 300 - Program Standards

- Sub-books for the following:
 - Aged, Blind, and Disabled
 - Family
 - Nursing Home

Section 400 - Income

- Sub-books for the following:
 - Aged, Blind, and Disabled
 - Family
 - Nursing Home

Section 500 - Assets

- Sub-books for the following:
 - Aged, Blind, and Disabled
 - Family
 - Nursing Home

Section 600 - Program benefits

- Sub-books for the following:
 - Aged, Blind, and Disabled
 - Family
 - Nursing Home

Section 700 - Eligibility Determination and Re-determination

Section 800 - Records and case management

Section 900 - Primary Care Network of Utah (PCN)

Tables and Glossary

The Chip Program will be its own manual.

Accessing InfoSource

DWS staff will access InfoSource through the Intranet. This “version” of InfoSource will include the links to procedures, forms, and training.

The public will have access of InfoSource via the Internet. Their version will not include links to procedures, forms, or training.

To access InfoSource through the Intranet:

1. Open the DWS intranet site (dws.utah.gov)
2. Complete the sign in by entering your User Name and Password. Press Enter
3. Click the section of the pie for your job function.
4. Click the link to InfoSource
5. Click on Eligibility or Medicaid

Tip: You may wish to open two intranet sessions so that you can view the Eligibility and Medicaid policy simultaneously.

Opening Multiple Manuals

To view the Financial, Food Stamp, and Child Care Manual and the Medicaid Manual:

- Open each manual in a separate Internet windows session.

Switching between manuals:

There are different ways to switch between each manual.

Option 1:

- Click on the manual on the tool bar at the bottom of the screen.

Option 2:

- Alt + tab key will rotate through all open functions.

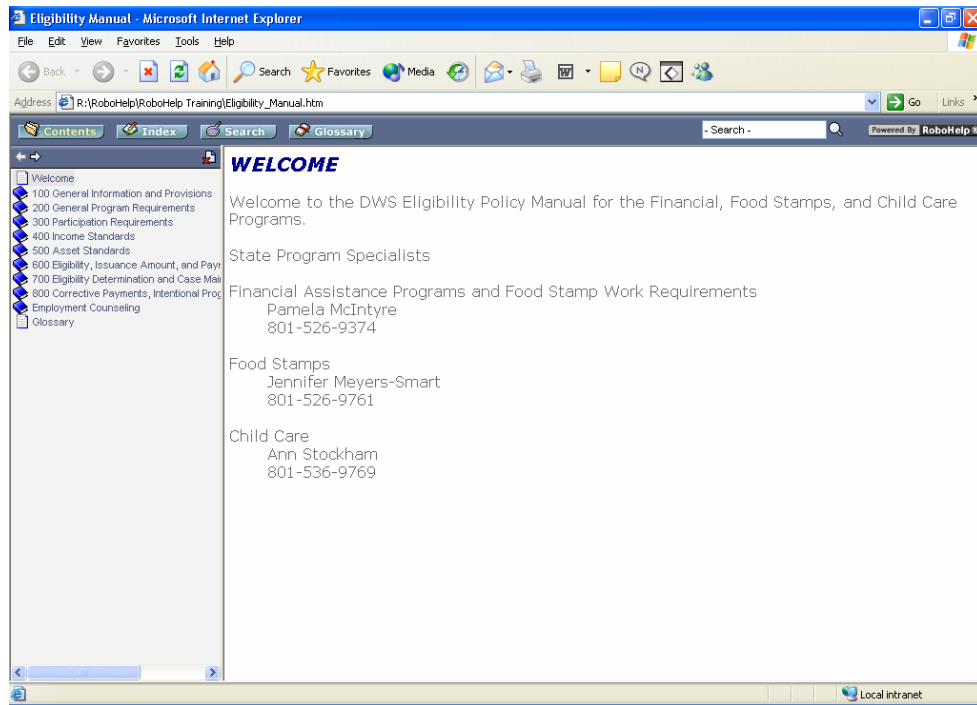
The manuals can also be viewed side by side so policy can be compared by changing the size of each window and displaying each one.

Searches in Manuals

Searches will only apply in the manual you are in. To find the policy in the other manual, the search will need to be done in the other manual.

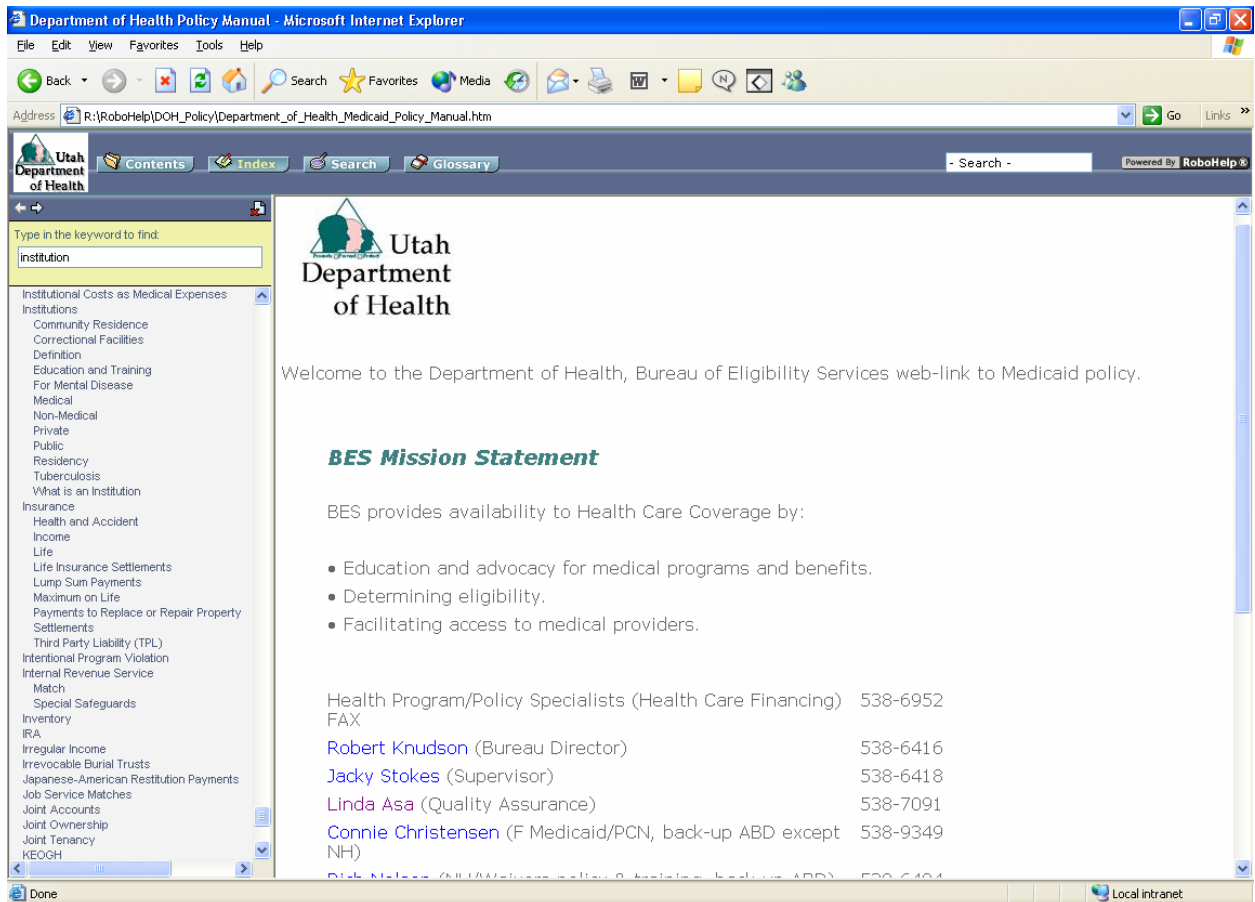
The InfoSource DWS Home Page

When the user accesses the Financial, Food Stamps, and Child Care Eligibility manual, the home page screen will look like this:



The Department of Health's InfoSource Home Page

When the user accesses the Medicaid manuals, the home page will look like this.

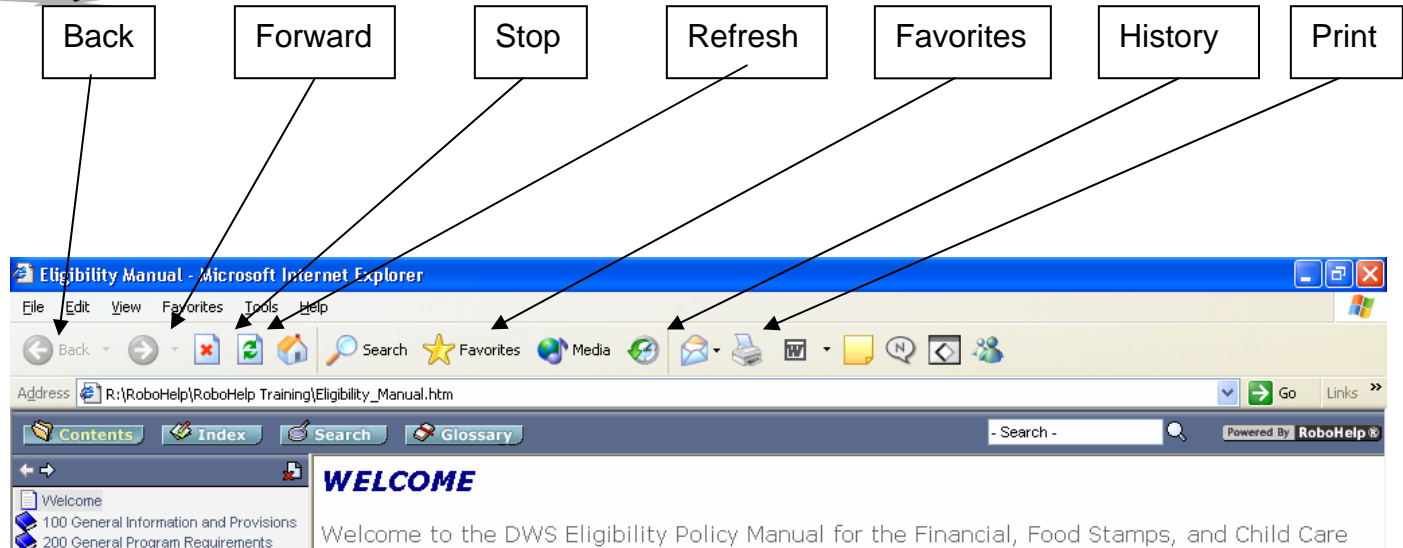


The names of the program specialists are listed on the home page. By clicking on the person's name, the user can send a e-mail directly to that individual.



Internet Explorer Tool Bar

Some of the following functions on the Internet Explorer Tool Bar will be useful to use in navigating through InfoSource.



Back

Goes back to the previous screen



Forward

Goes forward to the previous screen



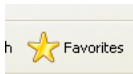
Stop

Stops the internet action



Refresh

Reloads the page



Favorites

Displays the customized list of sites you added to your favorites page. (See Adding Favorites)



History

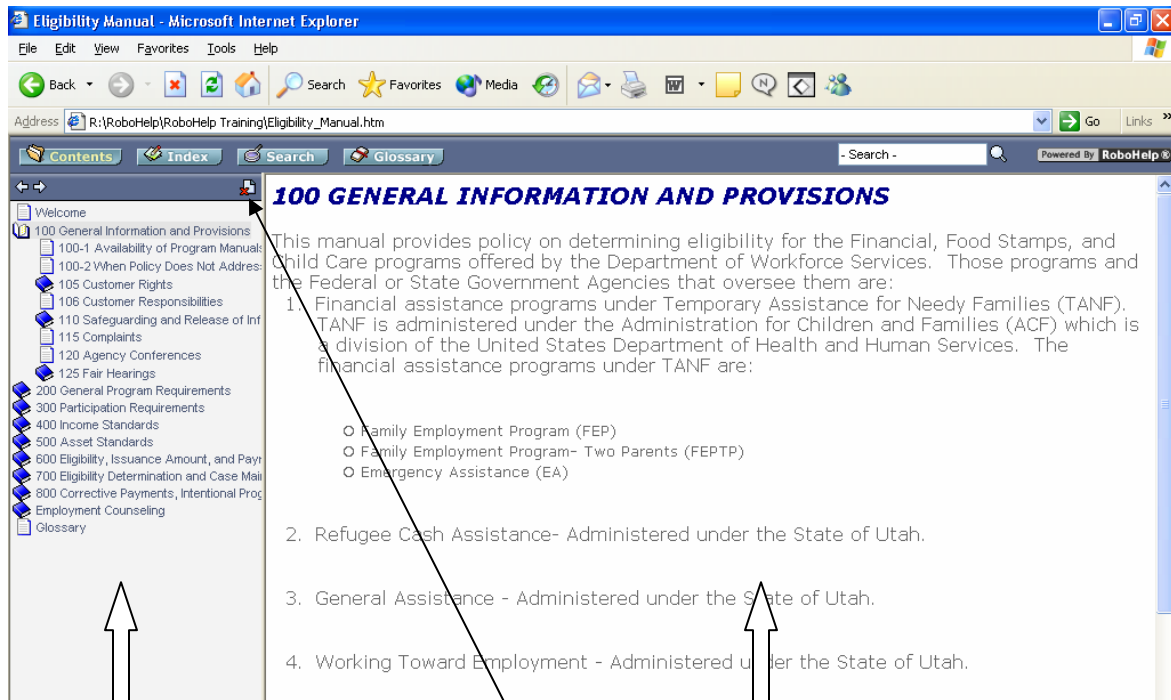
Displays a history of the sites the user has visited



Print

Prints the text in the pane where your cursor is

The InfoSource Screen



This is the **Navigation pane**.
It will help the user maneuver through InfoSource using the:

- Contents
- Index
- Search
- Glossary

It displays different information depending on which item is selected.

This is the **Content pane**.
It contains:


- Policy Text
- Links to training, procedures, and forms.

Sizing panes:

The size of each pane can be changed:

- Put your cursor on the line between the panes
- When the double arrow is displayed, use your mouse to change the pane margins

Hiding the Navigation Pane:

- The Navigation pane can be hidden by clicking on the  icon.
- Re-display the navigation pane by clicking on Content, Index, Search, or Glossary button.

Links and Pop-Ups

InfoSource contains links. There are links to:

- Policy related topics
- Training
- Procedures
- Forms

What is a Link?

A link is a “shortcut” that will take the user to an associated policy, training, procedure, or form. Click on the link to “jump” to that associated link.

Links are usually blue. Once the user has clicked on the link, the link will change color.

Links to Policy

When policy suggests that the user read other related policy sections, a link has been created. Click the Link and InfoSource will display the appropriate section.

Links to Training

In most instances, the examples have been removed from the Financial, Food Stamp, and Child Care manual. The examples are now be accessed through a link.

There are also links to trainings when a training module exists for that section of policy.

Links to Procedures

There are links to procedures.

In the reformatting of policy into InfoSource, explanations and “how to” procedures have been removed. They are now listed as procedures, with appropriate links to that procedure.

Links to Forms

Links to forms are established when policy refers to a specific form.

Navigation Pane: Contents

Navigation Pane: Contents

The Contents is a useful way to search policy, especially if the user is interested in a specific section of policy or a specific topic.

The Contents also shows the specific section for Employment Counseling.

To show the Contents:

1. In the Navigation pane, click **Contents** on the tool bar.
- If the full title of the content text is not displayed, put your cursor over the section topic and the full title is displayed.
 - The Tab key may also be used to maneuver through the Content screen.

Content button

Left/Right arrows:

The arrows will take you to the next or previous section of policy.

Closed book:

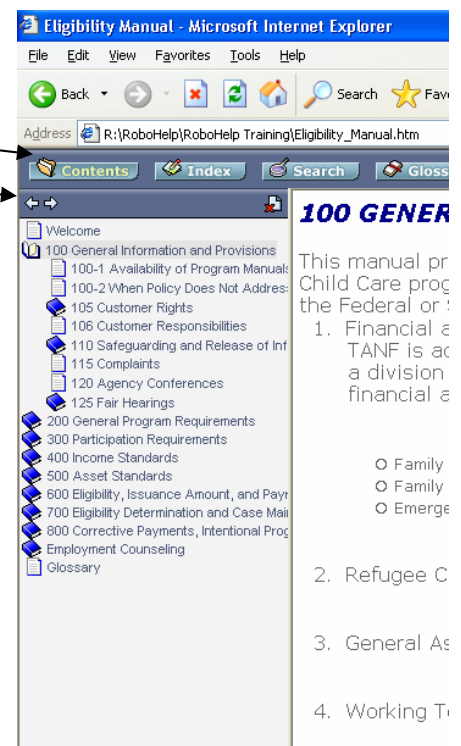
The closed book indicates that the book is currently collapsed. It can be expanded to display more sections of policy by clicking on the closed book icon.

Open book:

When the book is open, all title sections of policy are displayed.

Page:

The section of policy is displayed in the Content pane. Only that highlighted section of policy is displayed in the Content pane.



Example:

To search for the policy on how real estate is counted as an asset:

- Contents can be used to view the Asset section of policy
- Expand the books to view all topics within assets
- Then specifically find policy regarding real estate

Navigation Pane: Index

Navigation Pane: Index

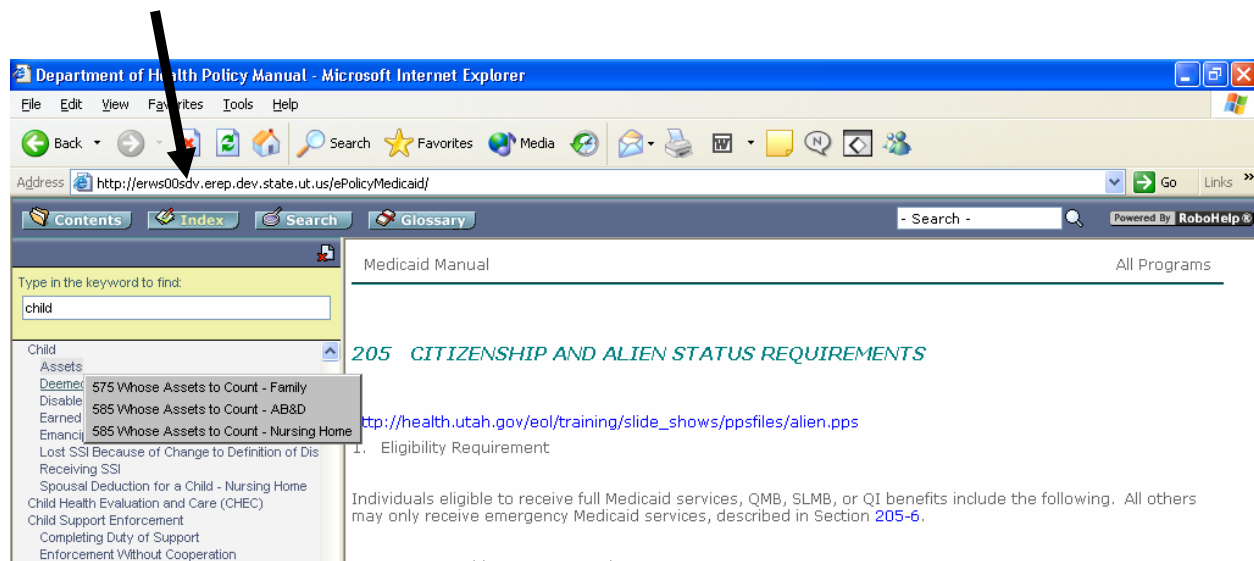
Index is another way to search for information. Index will display the indexed words alphabetically in the Navigation pane.

To display the Index:

1. In the Navigation pane, click **Index** on the tool bar.

Here is an InfoSource screen showing the Index in the Navigation pane.

Index button



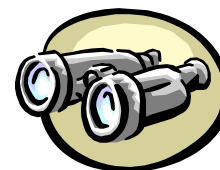
There are two ways to search using the Index:

1. Use the words that listed in the Index, or
2. Use the Keyword field
 - a. Type in the topic you are searching
 - b. InfoSource will look for that word in the first word of each line in the Index

Once the search is completed:

- A. If the topic is only located in one section of policy:
 - Click on the topic in the Navigation pane the policy will be displayed in the Content pane.
- B. If the policy is discussed in multiple sections of policy:
 - All policy references will be displayed in the Navigation pane
 - Click on the appropriate policy selection.
 - The policy will be displayed in the Content pane.

Navigation Pane: Search



Navigation Pane: Search

Search allows the user to search policy based on words or a string of words.

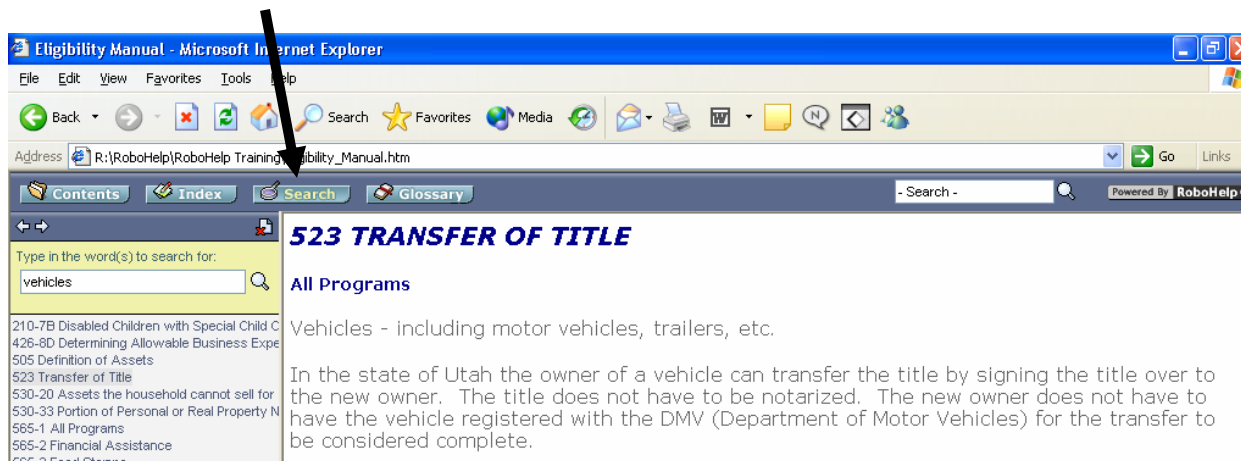
Wild card searches are not allowed; the use of the asterisk (*) is not used in searching.

InfoSource will search the entire manual based on the word(s) requested. (The user cannot narrow the search to a specific section of policy.)

To do a search:

1. Click on **Search** on the tool bar in the Navigation pane
2. At the field "Type in the word(s) to search for":
Type in the word(s) to search
3. Click on the binoculars icon (or press Enter).
4. The Navigation pane will display all the sections of policy that contain that word.
5. Click on the appropriate section of policy and the policy will be displayed in the Content pane.

Search Button



Words or phrases that were used to initiate the search will not automatically be highlighted when the section of policy is displayed.

To find a specific word in the Content pane:

1. Put your cursor in the Content Pane
2. On the Internet tool bar, click **Edit**
3. Click **Find (on this page)**
4. In the Find What" field: type in the word to be searched
5. Click **Find Next**. The word will be highlighted in the Content pane

Tip: If the Find (on this page) is not an available option, use **Control+F**.

Important:

When searching on a specific topic, it is important to use the Content pane in conjunction with the search function. This will insure that the user knows the context of the policy being searched.

1. When the policy is displayed in the Content pane, the corresponding policy reference will be highlighted on the Navigation pane.

Example:

1. Search for "Shelter costs"
2. Select 442-6 "Shelter Cost Deductions". The policy is displayed. Without also using Contents, the user may think that this policy is applicable to all programs.
3. Click Contents and find Section 442-6.
4. The user will find that this section is listed under the Section 442 "Income Disregards for Food Stamps". The user now knows that this is a deduction only for the Food Stamp program.

Navigation Pane: Glossary



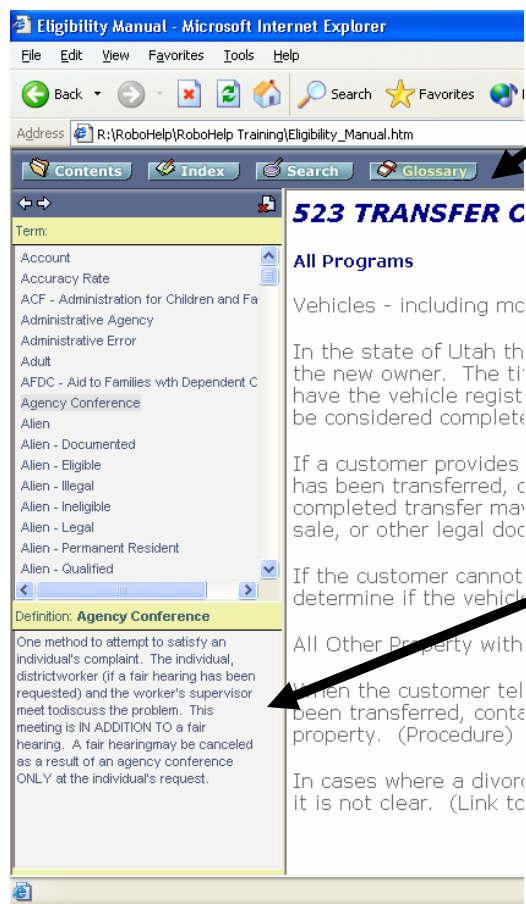
Navigation Pane: Glossary

Glossary provides a list of common words or phrases and the definition.

When using Glossary, the page or topic originally displayed in the Content pane will not change.

To use Glossary:

1. Click Glossary on the tool bar
2. Highlight the appropriate word from the list of Terms
3. The definition of the word will be displayed in the Definition field at the bottom of the pane.



Glossary Button

On this screen, the term **Agency conference** is selected.

The definition is listed in the Definition field.

Content Pane

The Content pane will display the section of policy highlighted in the Navigation pane.

- Policy that applies to all programs will be displayed first.
- Any special rules or considerations for specific programs will then be listed according to programs.
- To view the next section of policy, click on the arrow buttons on the Navigation pane.

The effective date of all policy in InfoSource will be April 1, 2004.

When policy is updated, the new page of policy will display the new policy effective date.

The screenshot shows a web browser window titled "Eligibility Manual - Microsoft Internet Explorer". The address bar shows the path "R:\RoboHelp\RoboHelp Training\Eligibility_Manual.htm". The browser has a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar with various icons. Below the toolbar is a search bar and a "Go" button. The main content area is titled "106 CUSTOMER RESPONSIBILITIES" and contains a list of responsibilities for customers. The left sidebar is the "Contents" pane, which lists various sections of the manual. Three arrows point from text labels to specific items in the Contents pane:

- Highlighted section of policy** points to "106 Customer Responsibilities".
- Policy that apply to all programs** points to "All Programs".
- Policy that applies To a specific program** points to "Additional Responsibilities for Financial Assistance Customers".

The main content area displays the following text:

106 CUSTOMER RESPONSIBILITIES

All Programs

1. Customers must complete and sign an application, including a form 61 for employment purposes (or other approved form), and give it to the appropriate Employment Center to apply for assistance.
2. Customers must give complete and correct information and provide requested verifications to establish eligibility for supportive services.
3. Customers must report changes and provide verifications according to the rules for the programs in which they are participating. This included income, employment, household changes, assets, and need for child care. For more information on changes that must be reported see Section 750-2.

For Financial Assistance, this includes changes and verifications to document movement toward the negotiated employment plan goal.
4. The customer is responsible for repaying any established overpayments of assistance received from Financial, Food Stamps, and Child Care programs.

Additional Responsibilities for Financial Assistance Customers

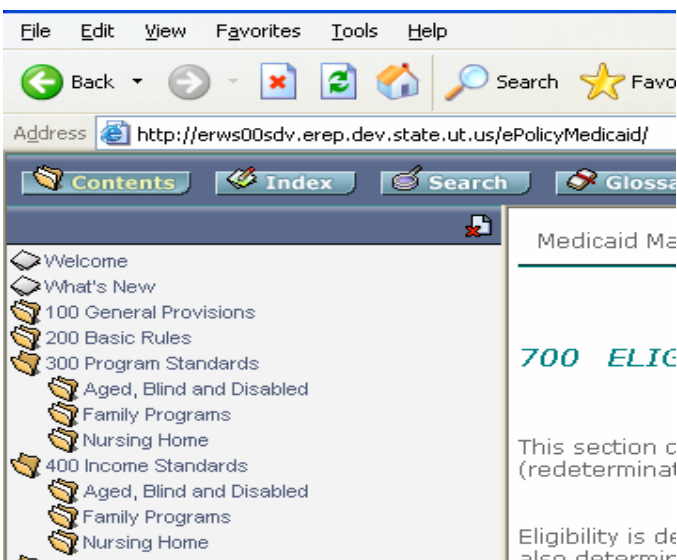
1. Participate in assessment including identifying goals and possible barriers to

Is the Medical Manual Different than the Financial, Food Stamp, and Child Care Manual?

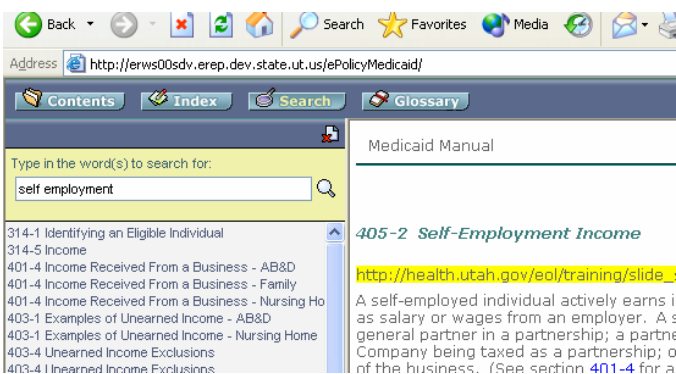
There are a few differences between the Medicaid Manual and the Financial, Food Stamp, and Child Care manual.

Medicaid Manual

- All sections except those listed below will have rules that are specific for all programs unless stated otherwise.
- Sections 300, 400, 500, and 600 display rules for specific programs within sub-books. The sub-books are for:
 - Aged, Blind, and Disabled
 - Family Programs
 - Nursing Home
- The Index and Search may also have a topic listed more than once, with specific references to A,B, D, or Family Programs, or Nursing Home.
- Examples and procedures are still included in the policy and are not separate links.



Here is a portion of the Contents for the Medical Manual. It shows the sub-books.



Here is a Search for Self Employment. Notice that the search brings up the same topic, with specific references to a particular program.

Adding Favorites

Favorites can be added to InfoSource. Favorites are bookmarked sections of policy that have been identified by the user. A user may want to add a Favorite when there is a particular section of policy that the user always refers to.

If a Favorite is added and that section of policy is changed, that Favorite will be updated automatically.

To Add a Policy Reference as a Favorite:

1. Put your cursor in the Content pane of the section of policy that you want to mark as a favorite.
2. Right-click on mouse and click **Add to Favorites**.
3. Click OK. (Notice that the name of the favorite will include the policy reference and section title.)
4. Click **OK**

Organizing Favorites

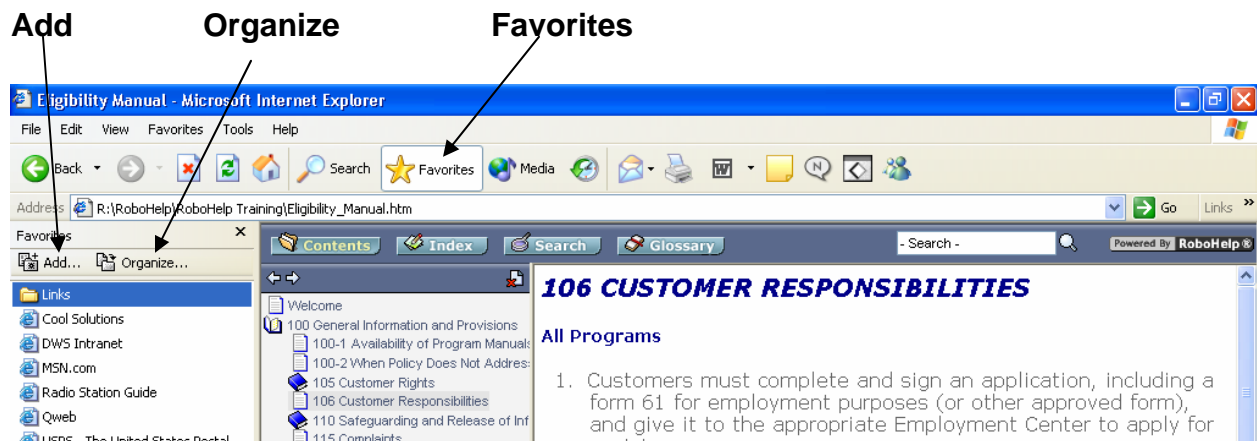
The user may want to organize the favorites by putting all of the favorites in a InfoSource Folder.

To create an InfoSource folder:

1. Click **Favorites** on the Tool Bar
2. Click **Organize** in the Favorites box
3. Click **Create Folder**. Type in the name of the Folder (ie InfoSource)
4. Click **Close**

To add your Favorite to the InfoSource folder:

1. On the Favorites list, highlight the name of the folder
2. Go to the section of policy to be added to the favorite
3. Click **Favorite**
4. Click **Add** in the Favorites box
5. Type the name of the favorite. Click **OK**
6. (Another option is to create your favorite, then move it (drag) it to the InfoSource folder.)



Printing

Hard copies of policy will no longer be printed and distributed by SDS.

Users can print policy topics. The information in the pane where your cursor is placed will be printed. (If your cursor is in the Content pane, the Content pane will be printed.)

To print the full page displayed in the Content pane:

1. Place the cursor in the Content pane
2. Click on the printer icon on the tool bar (or click File, Print or Control + P)
3. The policy displayed in the Content pane will be printed.

To print a portion of the policy displayed in the Content pane:

1. Using your mouse, highlight (block) the section of policy to be printed
2. On the Tool bar, click File, Print.
3. At the Page Range field, select Selection
4. Click Print
5. The selected portion of policy will be printed



Policy Changes or Clarifications in the Financial, Food Stamp, and Child Care Manual

Policy has not changed, but may have been rewritten and reformatted.

Future policy changes will be forthcoming for areas that were not addressed in policy manuals. These changes will follow the regular policy change process. Staff will be notified of these changes in policy in the normal SDS updates.

Obsolete Policy

Obsolete policy will be available for staff. Decisions are still being made regarding how staff will access the obsolete policy.

As policy changes, the new policy will reflect the implementation date of the new policy.



Future Enhancements

InfoSource will be a continual work in progress to improve usability for staff.

- There will be continued efforts to enhance the links to procedures, appropriate websites, and training.
- Icons will be used to identify the various links.
- Procedure manuals will be consolidated.
- Questions and suggestions regarding InfoSource are welcome. Please contact the following people via e-mail or phone with your input.
 - Sherra Lyn Westover 801 492-6661
 - Barbara Hollister 801 492-6662
- Questions regarding policy should be referred to the DWS Help desk.



Suggestions and Best Practices

1. Use InfoSource!

The more you use InfoSource, the easier it will be. It will help you:

- Increase your knowledge of policy
- Identify the clarifications in policy that have been addressed with InfoSource
- Give you more confidence in applying policy to specific situations
- Allow you to work more independently
- Be a resource to your co-workers
- Give you the ability to answer questions from the customer more accurately



2. Parts of policy can be confusing.

- To help you understand policy, take 10 minutes each week to review new changes, areas of policy that are not clear to you, or questions you are always asking your co-workers.
- You can become an expert for your co-workers on specific policy areas.

3. Give feedback to SDS regarding sections of policy that are still confusing. The program specialists can review the policy to see if it can be written more clearly or provide examples to help clarify the policy.

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